

STATEMENT OF ECONOMIC INTERESTS

Date Received
Official Use Only

A Public Document

AMENDMENT

Please type or print in ink

NAME (LAST) (FIRST) DAYTIME TELEPHONE NUMBER ()
MAILING ADDRESS STREET CITY ZIP CODE OPTIONAL: FAX / E-MAIL ADDRESS
(May be business address)

COVER PAGE

1. Office, Agency, or Court

Provide precise name. Do not use acronyms.

Division, Board, District, if applicable:

Position:

➡ Expanded Statement – List agency/position:

(Attach a separate sheet if necessary. Do not use acronyms.)

Agency: _____

Position Title: _____

2. Office Jurisdiction (Check one)

- ☐ State
☐ County of _____
☐ City of _____
☐ Multi-County _____
☐ Other _____

3. Type of Statement (Check at least one box)

- ☐ Assuming Office/Initial Date: ____/____/____
☐ Annual
(Check one)
☐ The period covered is January 1, 1999, through December 31, 1999.
☐ The period covered is ____/____/____, through ____/____/____.
☐ Leaving Office Date Left: ____/____/____
(Check one)
☐ The period covered is January 1, 1999, through the date of leaving office.
☐ The period covered is ____/____/____, through the date of leaving office.
☐ Candidate

4. Schedule Summary

(Check applicable schedules or "No reportable interests.")

➡ During the reporting period, did you have any reportable interests to disclose on:

Schedule A-1 ☐ Yes – schedule attached
Investments (Less than 10% Ownership)

Schedule A-2 ☐ Yes – schedule attached
Investments (Greater than 10% Ownership)

Schedule B ☐ Yes – schedule attached
Real Property

Schedule C ☐ Yes – schedule attached
Income & Business Positions (Income Other than Loans, Gifts, and Travel)

Schedule D ☐ Yes – schedule attached
Income – Loans

Schedule E ☐ Yes – schedule attached
Income – Gifts

Schedule F ☐ Yes – schedule attached
Income – Travel Payments

➡ ☐ No reportable interests

Total number of pages (including this cover page): _____

5. Verification

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on _____
(month, day, year)

SIGNATURE _____
(File the originally signed statement with your filing officer.)

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

AMENDMENT

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE

☐ \$1,000 - \$10,000

☐ \$10,001 - \$100,000

☐ Over \$100,000

NATURE OF INVESTMENT

☐ Stock

☐ Other _____

(Describe)

IF APPLICABLE, LIST DATE:

_____/_____/99 ____/____/99

ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY _____

GENERAL DESCRIPTION OF BUSINESS ACTIVITY _____

FAIR MARKET VALUE

☐ \$1,000 - \$10,000

☐ \$10,001 - \$100,000

☐ Over \$100,000

NATURE OF INVESTMENT

☐ Stock

☐ Other _____
(Describe)

IF APPLICABLE, LIST DATE:

_____/_____/99 ____/____/99
ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE

☐ \$1,000 - \$10,000

☐ \$10,001 - \$100,000

☐ Over \$100,000

NATURE OF INVESTMENT

☐ Stock

☐ Other _____

(Describe)

IF APPLICABLE, LIST DATE:

_____/_____/99 ____/____/99

ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE

☐ \$1,000 - \$10,000

☐ \$10,001 - \$100,000

☐ Over \$100,000

NATURE OF INVESTMENT

☐ Stock

☐ Other _____

(Describe)

IF APPLICABLE, LIST DATE:

_____/_____/99 ____/____/99

ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE

☐ \$1,000 - \$10,000

☐ \$10,001 - \$100,000

☐ Over \$100,000

NATURE OF INVESTMENT

☐ Stock

☐ Other _____

(Describe)

IF APPLICABLE, LIST DATE:

____/____/____ **99** ____/____/____ **99**

ACQUIRED DISPOSED

Verification

PRINT NAME _____

CITY, COUNTY, COURT
OR AGENCY _____

STATEMENT TYPE ☐ 99/2000 Annual ☐ Assuming ☐ Leaving
☐ (vr) Annual ☐ Candidate

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on _____
(month, day, year)

SIGNATURE _____

INSTRUCTIONS — SCHEDULES A-1 AND A-2

INVESTMENTS

“Investment” means any financial interest in any business entity located in or doing business in your agency’s jurisdiction (see Appendix-4) in which you, your spouse, or your dependent children had a direct, indirect, or beneficial interest aggregating \$1,000 or more at any time during the reporting period.

Reportable investments include:

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts.
- Sole proprietorships.
- Your own business or your spouse’s business (see Appendix-1 for the definition of business entity).
- Partnerships (e.g., law firm, family farm, etc.).
- Investments in reportable business entities held in a retirement account (see Appendix-5).
- Investments held by a business entity or trust (including a living trust) in which you, your spouse, or dependent children had a 10% or greater ownership interest.
- Business trusts.

You are not required to disclose:

- Diversified mutual funds registered with the Securities and Exchange Commission (SEC).
- Bank accounts, savings accounts, and money market accounts.
- Insurance policies.
- Annuities.
- Shares in a credit union.
- Government bonds.
- Retirement accounts invested in non-reportable interests such as insurance policies, diversified mutual funds, or government bonds (see Appendix-5).
- Defined benefit pension plans and profit sharing plans qualified under Internal Revenue Code section 401(a).
- Interests held in a blind trust (see Appendix-6).

REMINDERS

- ✓ Do you know your agency’s jurisdiction?
- ✓ Did you hold investments at any time during the period covered by this statement?
- ✓ Code filers - your code may require disclosure of specific investments only.

Use Schedule A-1 to report investments if your ownership interest in the entity was less than 10% (e.g., utility stock). You may also be required to complete Schedule C.

Use Schedule A-2 to report investments in which your ownership interest in the entity was 10% or greater (e.g., sole proprietorship). (See Instructions-10 on the back of Schedule A-1.)

TO COMPLETE SCHEDULE A-1:

- Disclose the name of the business entity.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, communications, etc.).
- Check the box indicating the fair market value of your investment (i.e., how much your investment was worth on the open market at its highest value during the period).
- Identify the nature of your investment (e.g., stocks, warrants, options, bonds).
- If you acquired or disposed of your investment interest during the reporting period, enter the date acquired or disposed.

Examples:

John Smith is a manager for a state agency. His conflict of interest code requires full disclosure of investments. John must disclose his stock holdings of \$1,000 or more in any company that does business in California as well as those held by his spouse and dependent children.

Susan Jones is a city council member. She has a 4% interest in a limited partnership located in the city which is worth \$5,000. Susan must disclose the partnership on Schedule A-1 and income of \$250 or more received from the partnership on Schedule C.

Alice Howard supervises the purchasing department of a governmental agency. She owns stock in a utility company which only does business in New York. Alice is a code filer and her disclosure category requires reporting of investments of the type that supply services or supplies to the agency. She is **not** required to report the utility company stock because the company does not do business in her jurisdiction.

Investments, Income, and Assets of Business Entities/Trusts

(Ownership Interest is 10% or Greater)

CALIFORNIA
1999/2000 FORM 700
FAIR POLITICAL PRACTICES COMM.

AMENDMENT**1. BUSINESS ENTITY OR TRUST**

Name _____

Address _____

Check one ☐ Trust, go to 2 ☐ Business Entity, complete the box, then go to 2**GENERAL DESCRIPTION OF BUSINESS ACTIVITY**

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE:

☐ \$1,000 - \$10,000☐ \$10,001 - \$100,000☐ Over \$100,000____/____/99
ACQUIRED____/____/99
DISPOSED

NATURE OF INVESTMENT

☐ Sole Proprietorship☐ Partnership☐

Other _____

YOUR BUSINESS POSITION _____

2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)☐ \$0 - \$249 ☐ \$250 - \$1,000 ☐ \$1,001 - \$10,000 ☐ OVER \$10,000**3. LIST EACH REPORTABLE SOURCE OF INCOME/LOANS OF \$10,000 OR MORE (attach a separate sheet if necessary)**

4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD BY THE BUSINESS ENTITY OR TRUST

Check one box:

☐ INVESTMENT☐ REAL PROPERTY

Name of Business Entity or

Street Address or Assessor's Parcel Number of Real Property _____

Description of Business Activity or

City or Other Precise Location of Real Property _____

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE:

☐ \$1,000 - \$10,000☐ \$10,001 - \$100,000☐ Over \$100,000____/____/99
ACQUIRED____/____/99
DISPOSED

NATURE OF INTEREST

☐ Property Ownership/Deed of Trust☐ Stock☐ Partnership☐ Leasehold _____

Yrs. remaining

☐ Other _____**4. (cont.)**

Check one box:

☐ INVESTMENT☐ REAL PROPERTY

Name of Business Entity or

Street Address or Assessor's Parcel Number of Real Property _____

Description of Business Activity or

City or Other Precise Location of Real Property _____

FAIR MARKET VALUE

IF APPLICABLE, LIST DATE:

☐ \$1,000 - \$10,000☐ \$10,001 - \$100,000☐ Over \$100,000____/____/99
ACQUIRED____/____/99
DISPOSED

NATURE OF INTEREST

☐ Property Ownership/Deed of Trust☐ Stock☐ Partnership☐ Leasehold _____

Yrs. remaining

☐ Other _____**Comments:** _____

Verification

PRINT NAME _____

CITY, COUNTY, COURT
OR AGENCY _____

STATEMENT TYPE

☐ 99/2000 Annual☐ Assuming☐ Leaving☐ _____ Annual
(yr)☐ Candidate

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on _____

(month, day, year)

SIGNATURE _____

INSTRUCTIONS – SCHEDULE A-2 INVESTMENTS

Use Schedule A-2 to report investments in a business entity or trust (including a living trust), in which you, your spouse, or your dependent children had a 10% or greater interest and which is located in or doing business in your agency's jurisdiction (see Appendix-4). A trust located outside your agency's jurisdiction is reportable if it holds assets that are located in or doing business in the jurisdiction.

Also report on Schedule A-2 investments and real property held by that entity or trust if your pro rata share of the interest was \$1,000 or more during the reporting period. For example, if you had a 20% partnership interest in a business entity and the entity owns real property, you would report that real property if your pro rata share of the value of the property was \$1,000 or more (i.e., if the property's value is at least \$5,000).

If you have more than one reportable business entity or trust, you must complete a separate Schedule A-2 for each entity and its holdings.

TO COMPLETE SCHEDULE A-2:

Part 1. Disclose the name and address of the business entity or trust. If you are reporting an interest in a business entity, complete the box as follows:

- Provide a general description of the business activity of the entity.
- Check the box indicating the fair market value of your investment.
- If you acquired or disposed of this interest during the reporting period, enter the date acquired or disposed.
- Identify the nature of your investment.
- Disclose the job title or business position you held with the entity, if any (i.e., if you were a director, officer, partner, trustee, employee, or held any position of management).

Part 2. Check the box indicating your gross income from the business entity or trust identified in part 1. Include the following:

- Gross income received **from** the business entity or trust in the form of salary, wages, reimbursement of expenses, or other compensation (including your community property interest in your spouse's income); and
- Your pro rata share of the gross income received **by** the business entity or trust (including your community property interest in your spouse's income).

Part 3. Disclose the name of each source of income located in or doing business in your agency's jurisdiction, as follows:

- Disclose each source of income and loans **to the business entity or trust** identified in part 1 if your pro rata share of the gross income (including your community property interest in your spouse's income) to the business entity or trust from that source was \$10,000 or more during the reporting period.
- Disclose each individual or entity that was a source of commission income of \$10,000 or more during the reporting period through the business entity identified in part 1 (see Appendix-1).

This may include sources of income where the income is generated outside your jurisdiction if the source is located or doing business in the jurisdiction.

You may be required to disqualify yourself from decisions affecting sources of \$250 or more in income, even though you are not required to report it.

You are not required to report on Schedule C income or business positions already reported on Schedule A-2.

Part 4. Report any investments or interests in real property held by the entity or trust identified in part 1 if your pro rata share of the interest held is \$1,000 or more.

- Check the applicable box indicating if the interest held is real property or an investment.
- If an investment, provide the name and description of the business entity.
- If real property, report the address or other precise location (e.g., assessor's parcel number) of the real property.
- Check the box indicating the fair market value of your interest in the real property or investment.
- Identify the nature of your interest.
- If you acquired or disposed of your interest in the property or investment during the reporting period, enter the date acquired or disposed.

Interests in Real Property

AMENDMENT

STREET ADDRESS OR PRECISE LOCATION	STREET ADDRESS OR PRECISE LOCATION
<div>CITY</div>	<div>CITY</div>
<div>FAIR MARKET VALUE IF APPLICABLE, LIST DATE:</div> <div> <input type="checkbox"/> \$1,000 - \$10,000 ____/____/99 <input type="checkbox"/> \$10,001 - \$100,000 ACQUIRED DISPOSED <input type="checkbox"/> Over \$100,000 </div>	<div>FAIR MARKET VALUE IF APPLICABLE, LIST DATE:</div> <div> <input type="checkbox"/> \$1,000 - \$10,000 ____/____/99 <input type="checkbox"/> \$10,001 - \$100,000 ACQUIRED DISPOSED <input type="checkbox"/> Over \$100,000 </div>
<div>NATURE OF INTEREST</div> <div> <input type="checkbox"/> Rental Property <input type="checkbox"/> Ownership/Deed of Trust <input type="checkbox"/> Easement <input type="checkbox"/> Leasehold _____ Yrs. remaining Other </div>	<div>NATURE OF INTEREST</div> <div> <input type="checkbox"/> Rental Property <input type="checkbox"/> Ownership/Deed of Trust <input type="checkbox"/> Easement <input type="checkbox"/> Leasehold _____ Yrs. remaining Other </div>
<div>IF RENTAL PROPERTY, GROSS INCOME RECEIVED</div> <div> <input type="checkbox"/> \$0 - \$249 <input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000 </div>	<div>IF RENTAL PROPERTY, GROSS INCOME RECEIVED</div> <div> <input type="checkbox"/> \$0 - \$249 <input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000 </div>
<div>SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, see the instructions for reporting sources of rental income.</div> <div>_____</div> <div>_____</div>	<div>SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, see the instructions for reporting sources of rental income.</div> <div>_____</div> <div>_____</div>
<div>NAME OF LENDER</div>	<div>NAME OF LENDER</div>
<div>ADDRESS</div>	<div>ADDRESS</div>
<div>BUSINESS ACTIVITY OF LENDER</div> <div> <input type="checkbox"/> Financial Institution <input type="checkbox"/> Other _____ </div>	<div>BUSINESS ACTIVITY OF LENDER</div> <div> <input type="checkbox"/> Financial Institution <input type="checkbox"/> Other _____ </div>
<div>INTEREST RATE TERM (Months/Years)</div> <div> _____% <input type="checkbox"/> None _____ </div>	<div>INTEREST RATE TERM (Months/Years)</div> <div> _____% <input type="checkbox"/> None _____ </div>
<div>HIGHEST BALANCE DURING REPORTING PERIOD</div> <div> <input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000 <input type="checkbox"/> Guarantor, if applicable </div>	<div>HIGHEST BALANCE DURING REPORTING PERIOD</div> <div> <input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000 <input type="checkbox"/> Guarantor, if applicable </div>
<div>Check below if another loan is disclosed on Schedule D.</div> <div> <input type="checkbox"/> Additional loan – refer to Sch. D. </div>	<div>Check below if another loan is disclosed on Schedule D.</div> <div> <input type="checkbox"/> Additional loan – refer to Sch. D. </div>

Verification

PRINT NAME _____ CITY, COUNTY, COURT OR AGENCY _____

STATEMENT TYPE ☐ 99/2000 Annual ☐ _____ Annual ☐ Assuming ☐ Leaving ☐ Candidate
(yr)

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein is true and complete. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on _____
(month, day, year)

SIGNATURE _____

INSTRUCTIONS – SCHEDULE B INTERESTS IN REAL PROPERTY

Reportable interests in real property are those located in your agency's jurisdiction (see Appendix-4), in which you, your spouse, or your dependent children had a direct, indirect, or beneficial interest aggregating \$1,000 or more any time during the reporting period.

Interests in real property include:

- An ownership interest (including a beneficial ownership interest).
- A deed of trust, easement, or option to acquire property.
- A leasehold interest (see Appendix-4).
- A mining lease (e.g., oil, gas, gold).
- An interest in real property held in a retirement account (see Appendix-5).
- An interest in real property held by a business entity or trust in which you, your spouse, or your dependent children had a 10% or greater ownership interest (report on Schedule A-2).

You are not required to report:

- A residence (i.e., home, vacation cabin) used exclusively as a personal residence. However, a residence in which you claim a business deduction may be reportable. In this situation, you may report the portion of the residence claimed as the tax deduction as the fair market value.
- Interests in real property held through a blind trust (see Appendix-6).

TO COMPLETE SCHEDULE B:

- Report the address or other precise location (e.g., assessor's parcel number) of the real property.
- Check the box indicating the fair market value of your interest in the property (regardless of what you owe on the property).
- If you acquired or disposed of your interest in the property during the reporting period, enter the date acquired or disposed.
- Identify the nature of your interest. If leasehold, also disclose the number of years remaining on the lease.

REMINDERS

- ✓ Income and loans already reported on Schedule B are not also required to be reported on Schedule C or D.
- ✓ Code filers - does your code require disclosure of real property?

- If you are reporting rental property, check the box indicating the gross rental income you received.
- If you had a 10% or greater interest in a rental property, list the name of each tenant if your pro rata share of the gross rental income from **that** tenant was \$10,000 or more during the reporting period.
- Loans which aggregate \$250 or more and are secured by real property may be reportable. Reportable loans may be disclosed on Schedule B or Schedule D. See instructions for Schedule D for an example and list of exceptions.
 - Provide the name and address of the lender.
 - Check the box describing the lender's business activity.
 - Disclose the interest rate and term of the loan. The term of a loan is the total number of months or years given for repayment of the loan at the time the loan was entered into. For variable interest rate loans, disclose the conditions of the loan (e.g., Prime +2) or the average interest rate paid during the reporting period.
 - Check the box indicating the highest balance of the loan during the reporting period.
 - Identify a guarantor, if applicable.

If you have more than one reportable loan on a single piece of real property, report the additional loan(s) on Schedule D.

Example:

Joe Nelson is a city planning commissioner. Joe received rental income of \$12,000 during the reporting period from a single tenant who rented property he owned in the city's jurisdiction.

If Joe had received the \$12,000 from two or more tenants, the tenants' names would not be required as long as no single source paid \$10,000 or more.

STREET ADDRESS OR PRECISE LOCATION 4621 Story Way	
CITY Sacramento, CA 95814	
FAIR MARKET VALUE	IF APPLICABLE, LIST DATE
<input type="checkbox"/> \$1,000 - \$10,000	<input type="checkbox"/> / / 99 / 99
<input type="checkbox"/> \$10,001 - \$100,000	ACQUIRED DISPOSED
<input checked="" type="checkbox"/> Over \$100,000	
NATURE OF INTEREST	
<input checked="" type="checkbox"/> Rental Property	<input type="checkbox"/> Ownership/Deed of Trust <input type="checkbox"/> Easement
<input type="checkbox"/> Leasehold	<input type="checkbox"/> Yrs. remaining <input type="checkbox"/> Other
IF RENTAL PROPERTY, GROSS INCOME RECEIVED	
<input type="checkbox"/> \$0-\$249	<input type="checkbox"/> \$250-\$1,000 <input type="checkbox"/> \$1,001-\$10,000 <input checked="" type="checkbox"/> Over \$10,000
SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, see the instructions for reporting sources of income.	
Suzette Jones	
NAME OF LENDER	
BFF Financial Services	
ADDRESS	
6200 Aspen Drive, Sacramento, CA 95814	
BUSINESS ACTIVITY OF LENDER	
<input checked="" type="checkbox"/> Financial Institution <input type="checkbox"/> Other	
INTEREST RATE	TERM (Months/Years)
8 % <input type="checkbox"/> None	15 Years
HIGHEST BALANCE DURING REPORTING PERIOD	
<input type="checkbox"/> \$250-\$1,000 <input checked="" type="checkbox"/> \$1,001-\$10,000 <input type="checkbox"/> Over \$10,000	

Income & Business Positions(Income Other than Loans, Gifts, and
Travel Payments)**AMENDMENT**

NAME OF SOURCE _____ ADDRESS _____ BUSINESS ACTIVITY, IF ANY, OF SOURCE _____ YOUR BUSINESS POSITION _____ GROSS INCOME RECEIVED <input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000 CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's income <input type="checkbox"/> Loan repayment <input type="checkbox"/> Sale of _____ <i>(Property, car, boat, etc.)</i> <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ _____ <input type="checkbox"/> Other _____ <i>(Describe)</i>	NAME OF SOURCE _____ ADDRESS _____ BUSINESS ACTIVITY, IF ANY, OF SOURCE _____ YOUR BUSINESS POSITION _____ GROSS INCOME RECEIVED <input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000 CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's income <input type="checkbox"/> Loan repayment <input type="checkbox"/> Sale of _____ <i>(Property, car, boat, etc.)</i> <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ _____ <input type="checkbox"/> Other _____ <i>(Describe)</i>
NAME OF SOURCE _____ ADDRESS _____ BUSINESS ACTIVITY, IF ANY, OF SOURCE _____ YOUR BUSINESS POSITION _____ GROSS INCOME RECEIVED <input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000 CONSIDERATION FOR WHICH INCOME WAS RECEIVED <input type="checkbox"/> Salary <input type="checkbox"/> Spouse's income <input type="checkbox"/> Loan repayment <input type="checkbox"/> Sale of _____ <i>(Property, car, boat, etc.)</i> <input type="checkbox"/> Commission or <input type="checkbox"/> Rental Income, list each source of \$10,000 or more _____ _____ <input type="checkbox"/> Other _____ <i>(Describe)</i>	<div style="background-color: black; color: white; padding: 5px; text-align: center;">Verification</div> PRINT NAME _____ CITY, COUNTY, COURT OR AGENCY _____ STATEMENT TYPE <input type="checkbox"/> 99/2000 Annual <input type="checkbox"/> Assuming <input type="checkbox"/> Leaving <input type="checkbox"/> _____ Annual <input type="checkbox"/> Candidate <i>(yr)</i> I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct. Executed on _____ <i>(month, day, year)</i> SIGNATURE _____

Comments: _____

INSTRUCTIONS – SCHEDULE C
INCOME & BUSINESS POSITIONS
(Income Other than Loans, Gifts, and Travel Payments)

Reportable income includes your gross income and your community property interest in your spouse's gross income aggregating \$250 or more received from any source located in or doing business in your agency's jurisdiction (see Appendix-4). Gross income is the total amount of income before deducting expenses, losses, or taxes. Do not use this schedule to report income from or to a business entity in which you have a 10% or greater ownership interest. Use Schedule A-2 instead.

Also use Schedule C to report the job title or business position you held with a business entity (i.e., if you were a director, officer, partner, trustee, employee, or held any position of management) during the period covered by the report. **This requirement applies even if you received no income from the business entity during the period.**

Commonly reportable income includes:

- Salary/wages, per diem, reimbursement for expenses.
- Community property interest (50%) in your spouse's income – report the employer's name.
- Income received from investment interests (e.g., partnerships) reported on Schedule A-1.
- Commission income not required to be reported on Schedule A-2.
- Gross income from any sale, including the sale of a house or car. The total sale price is reportable regardless of any obligation you might have to pay on loans secured by the item.
- Rental income not required to be reported on Schedule B.
- Prizes or awards not disclosed as gifts.
- Payments received on loans you made to others, including loan repayments from a campaign committee.
- An honorarium received by any newly appointed official or newly designated employee in the 12 months prior to assuming office, or for a non-incumbent candidate, in the 12 months prior to filing the candidate statement of economic interests. (See Appendix-3 concerning your ability to receive future honoraria.)

You are not required to report:

- Your salary or your spouse's salary or reimbursement for expenses and per diem from a federal, state, or local government agency.
- Campaign contributions.
- A cash bequest or cash inheritance.
- Dividends, interest, or other return on a security (e.g., stocks, bonds) which is registered with the Securities and Exchange Commission.
- Payments received under an insurance policy.
- Interest, dividends, or premiums on a time or demand deposit in a financial institution, shares in a credit union, an insurance policy, or a bond or other debt instrument issued by a government agency.
- Income of dependent children.

- Loan repayments received from your spouse, child, parent, grandparent, grandchild, brother, sister, parent-in-law, brother-in-law, sister-in-law, nephew, niece, aunt, uncle, or first cousin unless he or she was acting as an intermediary or agent for any person not covered by this provision.
- Alimony or child support payments.
- Payments received under a defined benefit pension plan qualified under Internal Revenue Code Section 401(a).

TO COMPLETE SCHEDULE C:

- Disclose the name and address of each source of income or each business entity with which you held a business position.
- Provide a general description of the business activity of the source or business entity (e.g., retail sales, law firm).
- Disclose the job title or business position, if any, you held with a business entity.
- Check the box indicating the amount of gross income if you received \$250 or more during the reporting period from the source or business entity.
- Identify the consideration for which the income was received.
- If your income is from commission sales, check the box indicating the gross income received and list the name of each source of commission income of \$10,000 or more (see Appendix-1). If your income is from rental property (and the property is not required to be listed on Schedule B), enter "Rental Income" under "Name", check the box indicating the gross income received, and, if you had a 10% or greater interest in the rental property, list the name of each tenant if your pro rata share of the gross income from that tenant was \$10,000 or more during the reporting period.

Example:

Teri Smith is a member of the Sacramento County Board of Supervisors. Her spouse is a manager for a bank in her jurisdiction. She must report the name of her spouse's employer, the bank, as a source of income.

REMINDERS

- ✓ If your spouse is self-employed, report the business entity on Schedule A-2 instead of Schedule C.
- ✓ You are not required to disclose on Schedule C income already reported on Schedule A-2 or B or business positions reported on Schedule A-2.
- ✓ Was the income received during the period covered by this statement?
- ✓ Code filers - Your code may require disclosure of income only from specified sources.

Income – Loans

(Received or Outstanding)

AMENDMENT

NAME OF LENDER _____ ADDRESS _____ BUSINESS ACTIVITY OF LENDER <input type="checkbox"/> Financial Institution <input type="checkbox"/> Other _____ INTEREST RATE _____ TERM (Months/Years) _____ _____% <input type="checkbox"/> None HIGHEST BALANCE DURING REPORTING PERIOD <input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000 SECURITY FOR LOAN <input type="checkbox"/> None <input type="checkbox"/> Automobile <input type="checkbox"/> Personal residence <input type="checkbox"/> Real Property _____ <div style="text-align: center;"><i>Street address</i></div> <div style="text-align: center;">_____</div> <div style="text-align: center;"><i>City</i></div> <input type="checkbox"/> Guarantor _____ <input type="checkbox"/> Other _____ <div style="text-align: center;"><i>(Describe)</i></div>	NAME OF LENDER _____ ADDRESS _____ BUSINESS ACTIVITY OF LENDER <input type="checkbox"/> Financial Institution <input type="checkbox"/> Other _____ INTEREST RATE _____ TERM (Months/Years) _____ _____% <input type="checkbox"/> None HIGHEST BALANCE DURING REPORTING PERIOD <input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000 SECURITY FOR LOAN <input type="checkbox"/> None <input type="checkbox"/> Automobile <input type="checkbox"/> Personal residence <input type="checkbox"/> Real Property _____ <div style="text-align: center;"><i>Street address</i></div> <div style="text-align: center;">_____</div> <div style="text-align: center;"><i>City</i></div> <input type="checkbox"/> Guarantor _____ <input type="checkbox"/> Other _____ <div style="text-align: center;"><i>(Describe)</i></div>
NAME OF LENDER _____ ADDRESS _____ BUSINESS ACTIVITY OF LENDER <input type="checkbox"/> Financial Institution <input type="checkbox"/> Other _____ INTEREST RATE _____ TERM (Months/Years) _____ _____% <input type="checkbox"/> None HIGHEST BALANCE DURING REPORTING PERIOD <input type="checkbox"/> \$250 - \$1,000 <input type="checkbox"/> \$1,001 - \$10,000 <input type="checkbox"/> Over \$10,000 SECURITY FOR LOAN <input type="checkbox"/> None <input type="checkbox"/> Automobile <input type="checkbox"/> Personal residence <input type="checkbox"/> Real Property _____ <div style="text-align: center;"><i>Street address</i></div> <div style="text-align: center;">_____</div> <div style="text-align: center;"><i>City</i></div> <input type="checkbox"/> Guarantor _____ <input type="checkbox"/> Other _____ <div style="text-align: center;"><i>(Describe)</i></div>	<div style="background-color: black; color: white; padding: 5px;">Verification</div> PRINT NAME _____ CITY, COUNTY, COURT OR AGENCY _____ STATEMENT TYPE <input type="checkbox"/> 99/2000 Annual <input type="checkbox"/> Assuming <input type="checkbox"/> Leaving <input type="checkbox"/> _____ Annual <input type="checkbox"/> Candidate <div style="text-align: center;"><i>(yr)</i></div> I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct. Executed on _____ <div style="text-align: center;"><i>(month, day, year)</i></div> SIGNATURE _____

Comments: _____

INSTRUCTIONS – SCHEDULE D
INCOME - LOANS
(Received or Outstanding)

Loans received or outstanding during the reporting period, which aggregate \$250 or more from a single source located in or doing business in your jurisdiction are reportable (see Appendix-4). Because loans are a type of income, your community property interest in loans received by your spouse must also be counted.

See the Appendix for important information about loan prohibitions.

Commonly reportable loans include:

- Real estate loans.
- Margin accounts.
- Automobile loans and automobile leases.
- Campaign loans secured by your personal assets or for which you are personally liable.
- Student loans.
- Credit card and retail installment debts.

You are not required to report:

- Any loan from a commercial lending institution secured by your principal place of residence if the loan was made in the lender's regular course of business on terms available to the public without regard to your official status. However, loans on other residences may be reportable.
- Loans from a commercial lending institution made in the lender's regular course of business on terms available to the public without regard to your official status which, in the aggregate, did not exceed \$10,000 at any time during the reporting period.
- Any retail installment or credit card debts incurred in the creditor's regular course of business on terms available to the public without regard to your official status which, in the aggregate, did not exceed \$10,000 at any time during the reporting period.
- Any loan from your spouse, child, parent, grandparent, grandchild, brother, sister, parent-in-law, brother-in-law, sister-in-law, nephew, niece, aunt, uncle, or first cousin or the spouse of any such person, unless the lender was acting as an intermediary or agent for any person not covered by this provision.
- Loans made to others. However, repayments may be reportable on Schedule C.
- A loan you co-signed for another person unless you made payments on the loan during the reporting period.

TO COMPLETE SCHEDULE D:

- Provide the name and address of the lender.
- Check the appropriate box describing the lender's business activity.
- Disclose the interest rate and the term of the loan.
 - The term of the loan is the total number of months or years given for repayment of the loan at the time the loan was entered into.
 - For variable interest rate loans, disclose the conditions of the loan (e.g., Prime +2) or the average interest rate paid during the reporting period.
 - The interest rate for an automobile lease is the money factor multiplied by the amount of time on the lease.
 - You may report "revolving" as the term of credit card loans from commercial lending institutions or loans against margin accounts with a stock broker.
 - If the conditions of a student loan are not known because they will be decided when you finish school, you may report "deferred."
- Check the box indicating the highest balance of the loan during the reporting period.
- Identify the security, if any, for the loan.

You are not required to disclose on Schedule D loans already reported on Schedule A-2 or B.

Example:

Colleen Jones is a city council member. She received a \$15,000 equity loan on her principal residence from a commercial lending institution which she used to buy an automobile. Because the loan was secured by her principal residence, it is not reportable.

REMINDERS

- ✓ Do you know your agency's jurisdiction?
- ✓ Did you receive any loans or have loans outstanding during the period covered by this statement?
- ✓ Code filers - Income includes any loan. Did you receive a loan from an entity or individual required to be reported as a source of income under your code?
- ✓ For loan restrictions, see Appendix-3.

AMENDMENT

NAME OF SOURCE		
ADDRESS		
BUSINESS ACTIVITY, IF ANY, OF SOURCE		
DESCRIPTION OF GIFT(S)	VALUE	DATE
	\$	/ /
	\$	/ /
	\$	/ /

NAME OF SOURCE		
ADDRESS		
BUSINESS ACTIVITY, IF ANY, OF SOURCE		
DESCRIPTION OF GIFT(S)	VALUE	DATE
	\$	/ /
	\$	/ /
	\$	/ /

NAME OF SOURCE		
ADDRESS		
BUSINESS ACTIVITY, IF ANY, OF SOURCE		
DESCRIPTION OF GIFT(S)	VALUE	DATE
	\$	/ /
	\$	/ /
	\$	/ /

Comments: _____

NAME OF SOURCE		
ADDRESS		
BUSINESS ACTIVITY, IF ANY, OF SOURCE		
DESCRIPTION OF GIFT(S)	VALUE	DATE
	\$ _____	____/____/____
	\$ _____	____/____/____
	\$ _____	____/____/____

NAME OF SOURCE		
ADDRESS		
BUSINESS ACTIVITY, IF ANY, OF SOURCE		
DESCRIPTION OF GIFT(S)	VALUE	DATE
	\$ _____	____/____/____
	\$ _____	____/____/____
	\$ _____	____/____/____

Verification

PRINT NAME _____

CITY, COUNTY, COURT
OR AGENCY _____

STATEMENT TYPE ☐ 99/2000 Annual ☐ Assuming ☐ Leaving
 ☐ _____ Annual ☐ Candidate
 ^(yr)

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Executed on _____
(month, day, year)

SIGNATURE _____

INSTRUCTIONS – SCHEDULE E

INCOME - GIFTS

“Gift” means anything of value, for which you have not provided equal or greater consideration to the donor. A gift is reportable if its fair market value is \$50 or more. In addition, multiple gifts aggregating \$50 or more received during the reporting period from a single source must be reported. **Gifts are reportable without regard to where the donor is located.**

It is the acceptance of a gift, not the ultimate use to which it is put, that imposes your reporting obligation. Therefore, except as noted below, you must report a gift even if you never used it or if you gave it away to another person.

If the exact amount of a gift is not known, you must make a good faith estimate of the item's fair market value. Listing the value of a gift as “over \$50” or “value unknown” is not adequate disclosure. In addition, if you received a gift through an intermediary, you must disclose the name, address, and business activity of both the donor and the intermediary.

Commonly reportable gifts include:

- Tickets/passes to sporting or entertainment events.
- Tickets/passes to amusement parks.
- Parking passes.
- Food, beverages, and accommodations, including that provided in direct connection with your attendance at a convention, conference, meeting, social event, meal, or like gathering, where you did not give a speech, participate in a panel or seminar, or provide a similar service.
- Rebates/discounts not made in the regular course of business to members of the public without regard to official status.
- Wedding gifts (see Appendix-6 to determine how to value).
- An honorarium. You may report an honorarium as income on Schedule C, rather than as a gift on Schedule E, if you provided services of equal or greater value than the payment received. (See the Appendix-3 regarding your ability to receive honoraria in the future.)
- Transportation and lodging (see Schedule F).
- Forgiveness of a loan received by you.

REMINDERS

- ✓ See Appendix-3 for gift and honoraria prohibitions.
- ✓ Code filers: Income includes any gift. Did you receive a gift from a reportable source?

You are not required to disclose:

- Gifts which were not used and which, within 30 days after receipt, were returned to the donor or delivered to a charitable organization without being claimed by you as a charitable contribution for tax purposes.
- Gifts from your spouse, child, parent, grandparent, grandchild, brother, sister, parent-in-law, brother-in-law, sister-in-law, aunt, uncle, niece, nephew, or first cousin or the spouse of any such person, unless the donor was acting as an agent or intermediary for a reportable source who was the true donor.
- Gifts of hospitality involving food, drink, or occasional lodging provided in an individual's home when the individual or a member of the individual's family was present.
- Gifts equal in value exchanged between you and an individual, other than a lobbyist, on holidays, birthdays, or similar occasions.
- Gifts of informational material provided to assist you in the performance of your official duties, such as books, pamphlets, reports, calendars, periodicals, or educational seminars.
- A cash bequest or cash inheritance.
- Personalized plaques and trophies with an individual value of less than \$250.
- Campaign contributions.
- Tickets to a fundraising event for a 501(c)(3) organization.
- Tickets to political fundraisers.
- Gifts given directly to members of your immediate family unless you received direct benefit from the gift or you exercised direction and control over the use or disposition of the gift.
- A pass or ticket which provided a one-time admission to an event (theater performance, sporting event) that was not used and was not transferred to another person. Commission Regulation 18946.1 provides a method for determining the value of a ticket or pass that was used or transferred to another person and for determining the value of passes or tickets which provide repeated admission to facilities or services.
- Food, beverages, and necessary accommodations provided directly in connection with an event at which you gave a speech, participated in a panel or seminar, or provided a similar service.

TO COMPLETE SCHEDULE E:

- Disclose the name and address and business activity, if any, of the source.
- Describe the gift and provide the fair market value of the gift and the date (month, day, and year) of receipt.

**Income – Gifts
Travel Payments, Advances, and
Reimbursements**

AMENDMENT

<div style="border-bottom: 1px solid black; margin-bottom: 5px;">NAME OF SOURCE</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">ADDRESS</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">CITY AND STATE</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">BUSINESS ACTIVITY, IF ANY, OF SOURCE</div> <div style="margin-bottom: 5px;">TYPE OF PAYMENT: <i>(check one)</i></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> <input type="checkbox"/> Gift <input type="checkbox"/> Income </div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> AMT: \$ _____ DATE(S): ____/____/____ <small>(If applicable)</small> </div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">DESCRIPTION:</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div>	<div style="border-bottom: 1px solid black; margin-bottom: 5px;">NAME OF SOURCE</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">ADDRESS</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">CITY AND STATE</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">BUSINESS ACTIVITY, IF ANY, OF SOURCE</div> <div style="margin-bottom: 5px;">TYPE OF PAYMENT: <i>(check one)</i></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> <input type="checkbox"/> Gift <input type="checkbox"/> Income </div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> AMT: \$ _____ DATE(S): ____/____/____ <small>(If applicable)</small> </div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">DESCRIPTION:</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div>
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<div style="border-bottom: 1px solid black; margin-bottom: 5px;">NAME OF SOURCE</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">ADDRESS</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">CITY AND STATE</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">BUSINESS ACTIVITY, IF ANY, OF SOURCE</div> <div style="margin-bottom: 5px;">TYPE OF PAYMENT: <i>(check one)</i></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> <input type="checkbox"/> Gift <input type="checkbox"/> Income </div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> AMT: \$ _____ DATE(S): ____/____/____ <small>(If applicable)</small> </div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">DESCRIPTION:</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div>	<div style="border-bottom: 1px solid black; margin-bottom: 5px;">NAME OF SOURCE</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">ADDRESS</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">CITY AND STATE</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">BUSINESS ACTIVITY, IF ANY, OF SOURCE</div> <div style="margin-bottom: 5px;">TYPE OF PAYMENT: <i>(check one)</i></div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> <input type="checkbox"/> Gift <input type="checkbox"/> Income </div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> AMT: \$ _____ DATE(S): ____/____/____ <small>(If applicable)</small> </div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">DESCRIPTION:</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;"></div>

NAME OF SOURCE

ADDRESS

CITY AND STATE

BUSINESS ACTIVITY, IF ANY, OF SOURCE

TYPE OF PAYMENT: *(check one)*

☐ Gift
☐ Income

AMT: \$ _____
DATE(S): ____/____/____
(If applicable)

DESCRIPTION:

NAME OF SOURCE

ADDRESS

CITY AND STATE

BUSINESS ACTIVITY, IF ANY, OF SOURCE

TYPE OF PAYMENT: *(check one)*

☐ Gift
☐ Income

AMT: \$ _____
DATE(S): ____/____/____
(If applicable)

DESCRIPTION:

NAME OF SOURCE

ADDRESS

CITY AND STATE

BUSINESS ACTIVITY, IF ANY, OF SOURCE

TYPE OF PAYMENT: *(check one)*

☐ Gift
☐ Income

AMT: \$ _____
DATE(S): ____/____/____
(If applicable)

DESCRIPTION:

NAME OF SOURCE

ADDRESS

CITY AND STATE

BUSINESS ACTIVITY, IF ANY, OF SOURCE

TYPE OF PAYMENT: *(check one)*

☐ Gift
☐ Income

AMT: \$ _____
DATE(S): ____/____/____
(If applicable)

DESCRIPTION:

NAME OF SOURCE

ADDRESS

CITY AND STATE

BUSINESS ACTIVITY, IF ANY, OF SOURCE

TYPE OF PAYMENT: *(check one)*

☐ Gift
☐ Income

AMT: \$ _____
DATE(S): ____/____/____
(If applicable)

DESCRIPTION:

NAME OF SOURCE

ADDRESS

CITY AND STATE

BUSINESS ACTIVITY, IF ANY, OF SOURCE

TYPE OF PAYMENT: *(check one)*

☐ Gift
☐ Income

AMT: \$ _____
DATE(S): ____/____/____
(If applicable)

DESCRIPTION:

NAME OF SOURCE

ADDRESS

CITY AND STATE

BUSINESS ACTIVITY, IF ANY, OF SOURCE

TYPE OF PAYMENT: *(check one)*

☐ Gift

INSTRUCTIONS — SCHEDULE F
INCOME – GIFTS
TRAVEL PAYMENTS, ADVANCES,
AND REIMBURSEMENTS

Reportable travel payments include advances and reimbursements for travel and related lodging and subsistence.

You are not required to disclose:

- Travel payments received from any state, local, or federal government agency for which you provided services equal or greater in value than the payments received.
- Travel payments received from your employer in the normal course of your employment.
- Payments or reimbursements for transportation within California in connection with an event at which you gave a speech, participated in a panel or seminar, or performed a similar service.
- Food, beverages, and necessary accommodations received directly in connection with an event held inside or outside California at which you gave a speech, participated in a panel, or provided a similar service. Note that payments for transportation outside of California are reportable.
- A travel payment which was received from a nonprofit entity exempt from taxation under Section 501(c)(3) of the Internal Revenue Code for which you provided equal or greater consideration.

REMINDERS

- ✓ Did you receive travel payments during the period covered by this statement?
- ✓ Code filers - Travel payments, advances, and reimbursements for travel, like gifts, are types of "income." Did you receive travel payments from any individual or entity required to be reported as a source of income under your code?

TO COMPLETE SCHEDULE F:

- Disclose the name and address of the source of the travel payment.
- Identify the business activity, if any, of the source.
- Check the box to indicate if the payment was a gift or income, report the amount, and disclose the date(s) if applicable.

-- Travel payments are gifts if you did not provide services which were equal to or greater in value than the payments received. You must disclose gifts aggregating \$50 or more from a single source during the period covered by the statement. Gifts of travel are reportable without regard to where the donor is located.

When reporting travel payments which are gifts, you must provide a description of the gift and the date(s) received.

-- Travel payments are income if you provided services which were equal to or greater in value than the payments received. You must disclose income aggregating \$250 or more from a single source during the period covered by the statement.

When reporting travel payments as income, you must describe the services you provided in exchange for the payment. You are not required to disclose the date(s) for travel payments which are income.

Gifts of travel may be subject to a \$300 gift limit. In addition, certain travel payments are reportable gifts, but are not subject to the gift limit. To avoid possible misinterpretation or the perception that you may have received a gift in excess of the gift limit, you may wish to provide a specific description of the purpose of your travel. See the Commission's Fact Sheet on Gifts, Honoraria, Travel, and Loans (1/2000), which can be obtained from your filing officer or the FPPC.